



CHECKLIST

Board Member Orientation

According to the 2020 Nonprofit Leadership Impact Study, the two biggest challenges that impact board effectiveness are:

1. Making sure board members are actively participating in fundraising activities, and keeping them motivated to do so.
2. Establishing clear roles and expectations for each board member

Our Board Member Orientation Checklist will help you face both these challenges head on. Use it to add clarity to your onboarding process and to provide your board members with a deeper understanding of your organization's mission and operations.



Board Member Checklist

Aim to complete this checklist within 30, 60, or 90 days, depending on what makes the most sense for how your organization runs. Print two copies — one for yourself and one for your new board member — so you can both keep track of how the orientation process is progressing.

Board Member Name: _____

Please complete all items on this checklist by __/__/____. See _____ for any questions.

INTRODUCTIONS

- Conduct a full facility tour and meet staff members.
- Meet with Board Chair and Executive Director for an overview of the organization's history, mission, and vision.
- Review board orientation packet in full, which should include:
 - o A list of all active board members
 - o A board meeting schedule
 - o A board member role description
 - o A list of active committees
 - o An organizational chart
 - o A list of upcoming org events
 - o Internal by-laws
 - o The approved budget for the calendar year
 - o A copy of the most up to date strategic/business plan

FINANCIALS

- Set a meeting with the Chief Financial Officer/Treasurer.
- Review financial documentation (annual reports, Form 990s) from recent years.
- Review budgeting process (when it happens, who's involved, etc.).
- Review current annual budget, going over any notable trends in expenses and revenue.

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FUNDRAISING

- Set a meeting with the Chief Development Officer.
- Review fundraising basics: key terminology, best practices, and approaches by channel.
- Review organization's fundraising program and key strategies.
- Review expectations for board members' involvement in fundraising activities.

BOARD OPERATIONS

- Set a recurring meeting with a veteran Board Member.
- Review meeting minutes from the past three board meetings.
- Review board meeting logistics (when and where they're held, how the agenda is set, etc.).
- Select committee assignment(s).

Please meet with _____ for progress check-ins on the following dates:

Check-in #1: __/__/____

Check-in #2: __/__/____